



IMPROVEMENT PLANS

User Manual

CONTENTS

IMPROVEMENT PLANS	5
INTRODUCTION	7
LIST OF IMPROVEMENT PLANS	8
Accessing Improvement Plans	8
Getting familiar with the interface	8
Search filters area	8
List of found results	8
Action bar	9
Searching for Improvement Plans	9
IMPROVEMENT PLAN DETAILS	10
Getting familiar with the Improvement Plan Sheet	10
General Information Tab	11
Tasks Tab	12
CREATING, EDITING, AND DELETING IMPROVEMENT PLANS	13
Creating a new Improvement Plan	13
Creating an Improvement Plan to address an exception	13
Creating an Improvement Plan to address problems identified through the supplier evaluation process	13
Creating an Improvement Plan from scratch	14
Editing an existing Improvement Plan	14
Deleting an Improvement Plan	14
MANAGING IMPROVEMENT PLANS	15
Defining the Plan workgroup	15
Adding users to the workgroup	15
Assigning a profile to a workgroup member	15
Managing improvement tasks	15
Importing tasks from another improvement plan	15
Adding improvement tasks	15
Tracking a task progress	16
Exporting a task as a vCalendar file for importing into MS Outlook	16
SUPPLIER ACCESS TO IMPROVEMENT PLANS VIA THE SUPPLIER PORTAL	17
Accessing Improvement Plans	17
Getting familiar with the Improvement Plan record	17
Managing your tasks	18

IMPROVEMENT PLANS

Introduction

IVALUA BUYER offers extensive supplier evaluation and process improvement features to help you weld your supply chain into a cohesive, competitive, and cost effective strategic system.

The Supplier Performance Evaluation (SPE) module provides you with the means to assess a supplier's ability to execute based on a set of performance expectations.

The Exception Management module gives you the ability to report problems arising within the relationship with the supplier.

IVALUA BUYER provides a powerful means to leverage those 2 sources of valuable input, as the SPE and Exception Management modules directly tie to and drive supplier Improvement Plans' creation.

The Improvement Plans module helps you build and follow up a plan of corrective actions to address the problems that have been identified.

In order to manage effective dialogue in respect to continuous improvement, the supplier is granted secure extranet access to the plan.

Supplier contacts who are involved have access to the tasks that are assigned to them and can update their progress status.

List of Improvement Plans

Accessing Improvement Plans

Select the *Suppliers / Improvement Plans* menu.

Getting familiar with the interface

The *Improvement Plans* page is comprised of the following parts:

- 1 Search filters area
- 2 List of found results
- 3 Action bar

The screenshot shows the 'Improvement Plans' page. At the top, there's a search bar with 'Search ...' and icons for shopping cart and print. Below it, a search filters area (1) includes 'Keywords:', 'Leader:', and buttons for 'Search', 'Reset', and 'Advanced search'. The main part is a table of found results (2) with columns: Label, Status, Start date, Supplier, Campaign, Exception(s), Planned end date, and Tasks. The table lists three results. At the bottom, there's an action bar (3) with a 'Create new Improvement Plan' button. The footer shows 'Ivalua Buyer demo v8.146 ©'.

Label	Status	Start date	Supplier	Campaign	Exception(s)	Planned end date	Tasks
LRMP Sales process improvement	Drafted	9/16/2015	Laptop Repair Maintenance & Parts	new suppliers risk assessment		9/30/2015	1
Improvement plan made by supplier	In progress	2/27/2014	ABB		Prices in new catalog are to high		1
Progress plan on "Prices in new catalog are too high"	In progress	2/25/2013	ABB		Prices in new catalog are to high		1

3 Result(s)

Ivalua Buyer demo v8.146 © [Create new Improvement Plan](#)

Search filters area

It lets you filter the list of displayed Improvement Plans.

List of found results

It presents the list of Improvement Plans that match the selected search filters.

The table below describes the Improvement Plan list columns:

Column	Description
	Deletes the Improvement Plan (deletion becomes effective only after your confirmation) Available only if the connected user has the required authorizations.
	Opens up the Improvement Plan
Label	Name of the Improvement Plan
Status	Improvement Plan status (Initialized, In progress, Completed)
Start date	Improvement Plan start date
Supplier	Involved supplier
Campaign	Supplier Evaluation Campaign the improvement plan was created from
Exception(s)	Exception the improvement plan was created from
Planned end date	Improvement Plan end date

<i>Column</i>	<i>Description</i>
Tasks	Number of logged tasks

Action bar

<i>Button</i>	<i>Description</i>
Create new improvement plan	Opens up a new Improvement Plan Sheet for creation

Searching for Improvement Plans

The upper part of the *Improvement Plans* page contains search filters. These filters let you easily retrieve an improvement plan or a set of plans meeting specific criteria.

1. Define your search criteria by selecting appropriate filters.
To obtain further information on how to use search filters in IVALUA BUYER, please refer to the *User Manual – Getting started* section.
2. When done, click the **Search** button to start searching. Matching items are displayed in the results list.
To cancel selected filters and go back to the default list, click the **Reset** button.

Improvement Plan Details

Getting familiar with the Improvement Plan Sheet

The Improvement Plan Sheet includes the following elements:

The screenshot displays the 'Improvement plan: LRMP Sales process improvement' interface. At the top, there's a navigation bar with a search bar and a shopping cart icon. Below this, the 'General information' tab is selected, indicated by a red circle with the number 2. The main content area is divided into two columns. The left column contains fields for 'Plan identity' (Label, Start date, End date, Supplier, Status) and 'Progress' (Add a comment, Comment, File attachment). The right column contains fields for 'Organization' (Organization), 'Families' (Commodity), and 'Origin' (Campaign, Exception). At the bottom, there's a footer with the text 'Ivalua Buyer demo v8.146' and a red circle with the number 3 highlighting the 'Save' and 'Finish' buttons.

1 Improvement Plan label

2 Thematic tabs

They allow for the structured organization of information.

To obtain a description of each tab, refer to the following sections:



General Information Tab p 11

Tasks Tab p 12

3 Action bar

It allows you to save your edits.

General Information Tab


< ↻ ☆ Improvement plan: LRMP Sales process improvement Search ...  


General information

Tasks

Plan identity ▾

Label : LRMP Sales process improvement

Start date : 9/16/2015 

End date : 9/30/2015 

Supplier : Laptop Repair Maintenance & Parts ...

Status : Drafted ▾

Organization ▾

Organization : sfo - San Francisco ...

Families ▾

Commodity : ...

Origin ▾


Campaign : ... [*new suppliers risk assessment](#)

Exception : ...

Progress ▾

Add a comment ▾

Comment :

File attachment :  Click or Drag to add files

By WALTERS Isaac , At 9/16/2015 7:42:04 PM



We need to resolve this issue asap

Ivalua Buyer demo v8.146 © Save Finish

The *General Information* tab contains the general characteristics of the Improvement Plan:

- Label,
- Start and End date (by default, the plan's creation date is used as the plan's start date),
- Status (*Initialized*, *In progress*, *Completed* – The list of statuses may be customized by the Administrator)
- Links to Supplier (mandatory), and optionally, Commodity, Organization, and SPE Campaign or Exception.
- Comments and/or files may be attached to the plan as needed.

Tasks Tab








< ↻ ☆ Improvement plan: LRMP Sales process improvement Search ...  

General information **Tasks**

Lookup Users...

	Label	Login	Email	Profiles
X	A DE	ade	ade@ivalua.com	<input type="text"/> x Progress plan - Buyer
X	LAURENZ Oscar	abb@email.fr	abb@email.fr	<input type="text"/> x Progress plan - Buyer 1
X	SMITH Adam	asmith	adam.smith@gmail.com	<input type="text"/> x Progress plan - Buyer
X	WALTERS Isaac	iwalters	isaac.walters@gmail.com	<input type="text"/> x Progress plan - Leader

Add a task

	Type	Description	Manager	Delegated to	Initial begin date	Initial end date	Updated begin date	Updated end date	Actual begin date	Actual end date	Initial load	Updated load	Progress	Previous task	Link type	Link delay	Order	Status
X	 Action		Isaac Walters	Adam Smith	9/16/2015 	9/18/2015 		11/30/2015 			Person-days	Person-days	%				1	

1 Result(s)

Ivalua Buyer demo v6.146 © Save Finish

The *Tasks* tab includes the following parts:



Workgroup member selection

→ This section lets you select the users involved in the Improvement Plan and lets you assign them a specific profile within the workgroup.

→ See *Defining the Plan workgroup*, on page 15



Task planning

→ This section lets you plan, share, edit, and track improvement activities.

→ See *Managing improvement tasks*, on page 15

Creating, editing, and deleting Improvement Plans

Creating a new Improvement Plan

An Improvement Plan will typically originate as a need to remediate:

- An exception that arose while interacting with the supplier
- Other type of problems identified through SPE process

You may also create ad hoc Improvement Plans.

Creating an Improvement Plan to address an exception

Exception detail sheets include an *Associated improvement plans* section, allowing you to create linked Improvement Plans.

1. From the Exception detail sheet, click the **Create an Improvement plan for this exception** button.
A new Improvement Plan displays, which is already linked to the relevant supplier and exception.
2. Fill in the *General Information* tab referring to the *Improvement Plan Details* section, on page 10.
3. Click the **Save** button.

Creating an Improvement Plan to address problems identified through the supplier evaluation process

Just like Exceptions, Evaluation Campaigns include an *Associated Improvement Plan* section, allowing you to create linked improvement plans.

1. From the Campaign detail sheet, click the **Create an improvement plan on this campaign** button.
A new Improvement Plan displays, which is already linked to the relevant supplier, commodity, and evaluation campaign.
2. Fill in the *General Information* tab referring to the *Improvement Plan Details* section, on page 10.
3. Click the **Save** button.


Creating an Improvement Plan from scratch

1. Access the List of Improvement Plans (*Suppliers / Improvement Plans* menu).
2. Click the **Create new Improvement Plan** button. The *Edit Improvement Plan* page displays.


The screenshot shows the 'Edit Improvement Plan' page. At the top, there's a navigation bar with a search bar and a shopping cart icon. Below this is a tabbed interface with 'General information' and 'Tasks' tabs. The 'General information' tab is active, displaying a form for plan details. The form is organized into several sections: 'Plan identity' (Label, Start date: 1/19/2016, End date, Supplier, Status: Drafted), 'Organization' (Organization, Families, Commodity), 'Progress' (Add a comment), and 'Origin' (Campaign, Exception). At the bottom, there's a 'File attachment' section with a 'Click or Drag to add files' button. The footer includes the text 'Ivalua Buyer demo v8.146 ©' and 'Save' and 'Finish' buttons.

3. Fill in the *General Information* tab referring to the *Improvement Plan Details* section, on page 10.
4. Click the **Save** button.

Editing an existing Improvement Plan

1. Access the List of Improvement Plans (*Suppliers / Improvement Plans* menu).
2. Click the Edit icon  of the desired Improvement Plan. The selected plan's details display.
3. Enter your edits. To obtain more information on the various operations you may perform on existing Improvement Plans, see *Managing Improvement Plans*, on page 15.
4. Click the **Save** button.

Deleting an Improvement Plan

1. Access the List of Improvement Plans (*Suppliers / Improvement Plans* menu).
2. Click the *Delete* icon  of the Improvement Plan you wish to delete. A message displays, prompting you to confirm your request.
3. Click the **OK** button.

Managing Improvement Plans

Defining the Plan workgroup

An appropriately skilled team may be set up to manage the development and implementation of the Improvement Plan.

The plan creator is automatically added as the Plan Leader upon first save. He/She may later add other users, including supplier contacts, and set up the desired workgroup.

Adding users to the workgroup

1. Open the desired Improvement Plan.
2. Display the *Tasks* tab.
3. Click the **Lookup users** button. The *User Management* window displays.
4. Select the desired users by selecting their checkbox.
5. When done, click the **Close** button. Selected users are added to the workgroup.

Assigning a profile to a workgroup member

Supplier contacts added to the workgroup are automatically assigned the *Supplier* profile.


Intra-group users may be assigned either one of two profiles: Leader or Buyer.

1. Open the desired Improvement Plan.
2. Display the *Tasks* tab.
3. Use the drop-down list located in the *Profiles* column to select the desired profile.

Managing improvement tasks

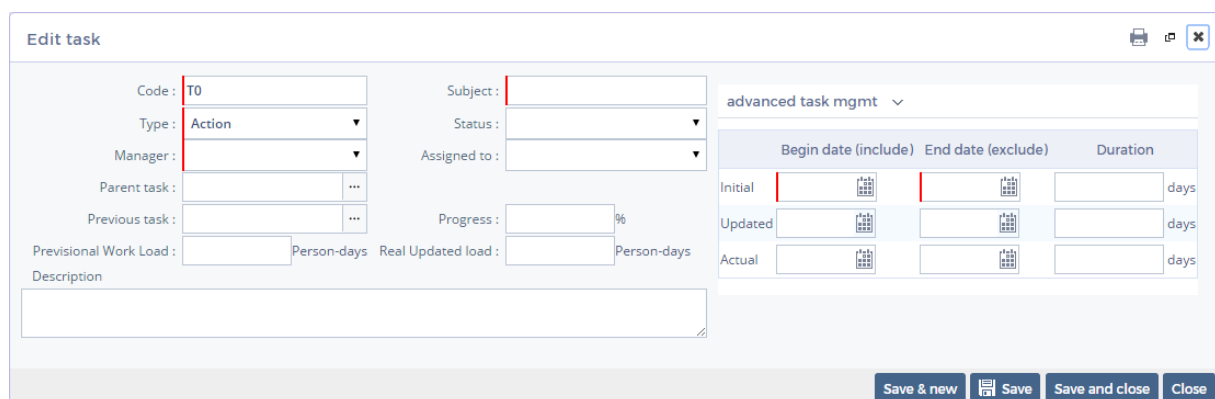
Importing tasks from another improvement plan

The task import feature is only available as long as no task has yet been created and no task import has yet been performed.

1. In the *Tasks* tab of the improvement plan, click the button **Create from a template schedule**. The *Improvement Plans* window displays: it presents the list of improvement plans whose tasks you may import.
2. Select the plan that contains the tasks to be imported by clicking its selection icon . Imported tasks are added to the current plan.


Adding improvement tasks

1. In the *Tasks* tab of the improvement plan, click the **Add a task** button. The *Edit task* window displays.




2. Fill in the task's details
 - Code
 - Subject of improvement activity
 - Type of task (*Event, Action, Workshop*, etc. – The list of types may be customized by the Administrator)
 - Manager and Assignee
 - Status (*Initialized, In progress, Completed* – The list of statuses may be customized by the Administrator)
 - Description of the activity (benefits, etc.)
 - Initial Begin and End date
 - Provisional Workload
3. Click the **Save & close** button.

Tracking a task progress

1. In the *Tasks* tab of the improvement plan, click the *Edit* icon  of the task you wish to open/edit. The selected task's details display in a secondary window.
2. The main progress tracking information is the progress percentage. Update it as the task is being carried out.
The *Status* field also reflects the completion status of the task (*Initialized, Scheduled, In progress, Done, Completed*).
When the task is completed, the actual end date and the workload may also be updated.
3. Click the **Save** or **Save & close** button to save edits before closing the window.

Exporting a task as a vCalendar file for importing into MS Outlook


1. In the *Tasks* tab of the improvement plan, click the *Export to Outlook* icon  of the task you wish to export. A file download window displays.
2. Click the **Save** button to save the task as a vCalendar file.
3. In MS Outlook, display your calendar, then select **File/Import & Export**.
4. In the window that displays, select **Import an iCalendar or vCalendar file**, then click **Next**.
5. In the file selection window that displays, make sure the appropriate file type is selected, then locate and double-click the file to be imported.
The imported task is now logged in your Outlook calendar.

Supplier access to Improvement Plans via the Supplier Portal




Accessing Improvement Plans

Select the *Client Relationships / Client Improvement Plans* menu.


The *Client Improvement Plans* list displays.

< ↺ ☆ Client Improvement Plans Search ... 

Status : Keywords : Q Search ↶ Reset

Label	Start date	Planned end date	Tasks	Status
 Late deliveries	1/15/2016		1	Drafted
 Improvement plan made by supplier	2/27/2014		0	In progress
 Progress plan on "Prices in new catalog are too high"	2/25/2013		1	In progress
3 Result(s)				

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To open an improvement plan, click its *Edit*  icon.

Getting familiar with the Improvement Plan record

The Improvement Plan record includes 2 tabs: *General information* and *Tasks*.


The *General information* tab presents the characteristics of the improvement plan.


< ↺ ☆ Improvement plan: Progress plan on "Prices in new catalog are too high" Search ...

General information Tasks

Plan identity ▾

Label : Progress plan on Exception: "Prices in new catalog are too high"

Start date : 2/25/2013 

End date : 

Supplier : ABB

Status : In progress ▾

Organization ▾

Organization : ...

Families ▾

Commodity : ...


Progress ▾

Origin ▾

Exception : Prices in new catalog are too high

Add a comment ▾

Comment :

File attachment :  Click or Drag to add files

Ivalua Buyer demo v8.146 © Save Finish

The **Tasks** tab lists the users involved in the improvement plan, as well as the tasks that are assigned to you within this plan.



Improvement plan: Progress plan on Exception: "Prices in new catalog are too high"

Search ...

General information **Tasks**

Lookup Users...


Stakeholder Name	Email	Profiles
x A DE	ade@ivalua.com	Progress plan - Buyer
x LAURENZ Oscar	abb@email.fr	Progress plan - Buyer Progress plan - Leader x Supplier

Export	Type	Description	Manager	Delegated to	Initial begin date	Initial end date	Updated begin date	Updated end date	Actual begin date	Actual end date	Initial load	Updated load	Progress	Previous task	Link type	Link delay	Order	Status
 	Action		Oscar Laurenz	Oscar Laurenz	1/18/2016	1/20/2016											2	Scheduled (%)

1 Result(s)

Ivalua Buyer demo v8.146 © Save Finish

Managing your tasks

To access the detail of a task that is assigned to you, click its **Edit**  icon.



Improvement plan: Progress plan on Exception: "Prices in new catalog are too high"

Search ...

General information **Tasks**

Lookup Users...

Stakeholder Name	Email	Profiles
x A DE	ade@ivalua.com	Progress plan - Buyer
x LAURENZ Oscar	abb@email.fr	Progress plan - Buyer Progress plan - Leader x Supplier

Export	Type	Description	Manager	Delegated to	Initial begin date	Initial end date	Updated begin date	Updated end date	Actual begin date	Actual end date	Initial load	Updated load	Progress	Previous task	Link type	Link delay	Order	Status
 	Action		Oscar Laurenz	Oscar Laurenz	1/18/2016	1/20/2016											2	Scheduled (%)

1 Result(s)

Ivalua Buyer demo v8.146 © Save Finish

The *Edit task* screen displays. Use this screen to update your tasks' progress information.

Code : T1

Type : Action

Manager : LAURENZ Oscar

Parent task :

Previous task :

Previsional Work Load : Person-days

Description

0 Result(s)

Subject : Issue analysis

Status : Scheduled

Assigned to : LAURENZ Oscar

Progress : %

Real Updated load : Person-days

	Begin date	End date	Duration
Initial	1/18/2016	1/20/2016	2 days
Updated	<input type="text"/>	<input type="text"/>	days
Actual	<input type="text"/>	<input type="text"/>	days

Add a comment

Comment :

File attachment :

Save

Save and close

Close